A New Look at the Call Center "Top Twenty"

The evolution of a simple call center into a multi-channel contact center doesn't just happen overnight. You many need to add or upgrade technologies, and certainly staff skills will need to expand as customer contacts begin to include email and Web chat in addition to incoming calls. It's also important to re-think what performance measurements are important for this new breed of operation. Are the measures of performance that have served you well in the call center the same ones that will determine how well the multi-channel contact center is working?

This article will examine the "top twenty" performance measures commonly associated with personnel and the processes in today's multi-channel center. The standard categories of service, quality, efficiency, and profitability will be used as the basis for the guide. For each of these, we'll take a look at why some of the "golden oldies" will still work just fine into the 21st Century and which ones need to be a "remix" in order to keep up with the times.

(Note: The term "call center" will be used to refer to a simple, incoming telephone call center and the term "contact center" will be used to address the needs of the multi-channel contact center.)

Service Measures

The most important measures of performance are those associated with service. Some of these measures are the same for both a call center and contact center, while some will need to change slightly to reflect the new types of transactions.

1. Blockage

Blockage is an accessibility measure that indicates what percentage of customers will not be able to access the center at a given time due to insufficient network facilities in place. Measures indicating blockage (busy signals) by time of day or occurrences of "all trunks busy" situations are utilized by most centers. Failure to include a blockage goal allows a center to always meet its speed of answer goal by simply blocking the excess calls. This can have a negative effect on customer accessibility and satisfaction while the call center looks like it is doing a great job in terms of managing the queue.

The contact center must also carefully determine the number of facilities needed in terms of both bandwidth and email server capacity to ensure that large quantities of emails do not overload the system. Likewise, the number of lines supporting fax services must be sufficient to provide a reasonable level of blockage.

2. Abandon Rate

Call centers measure the number of abandons as well as the abandon rate since both correlate with retention and revenues. It should be noted, however, that abandon rate is not entirely under the call center's control. While abandons are affected by the average wait time in queue (which can be controlled by the call center), there are a multitude of other factors that influence this number, such as individual caller tolerance, time of day, availability of service alternatives, and so on.

Abandon rate is not typically a measure associated with email communications, since the email does not abandon the "queue" once it has been sent, but it does apply to Web chat interactions.

3. Self-Service Availability
More and more contacts are being off-loaded today from call center agents to self-service alternatives. In the call center, self-service utilization is an important gauge of accessibility and is typically measured as an overall number, by self-service methodology and menu points, and by time of day or by demographic group.

In the contact center, self-service utilization should also be tracked. In cases of Web chat, automated alternatives such as FAQs or use of help functions can reduce the requirement for the live interaction with a Web chat agent.

4/5. Service Level/ASA
Service level, the percentage of calls that are answered in a defined wait threshold, is the most common speed of answer measure in the call center. It is most commonly stated as *x* percent of calls handled in *y* seconds or less, while average speed of answer (ASA) represents the average wait time of all calls in the period.

In the contact center, speed of answer for Web chat should also be measured and reported with a service level or ASA number. Many centers measure for both initial response as well as the back-and-forth times, since having too many open Web chat sessions can slow the expected response time once an interaction has begun. The speed of answer for email transactions on the other hand is defined as a "response time" and may be depicted in terms of hours or even days, rather than in seconds or minutes of elapsed time.

6. Longest Delay in Queue
Another speed of answer measure is the age of the contact that has been in queue the longest, or the longest delay in queue (LDQ). Many call centers use real-time LDQ as a measure to indicate when immediate staffing reactions may be required.

Historical LDQ is a more likely contact center measure to indicate the "worst case" experience of a customer over a period of time. Historical LDQ is measured in two categories. One is the longest delay for a customer whose transaction was finally handled by an agent (Longest Delay to Answer), and the other is longest delay for a customer who finally abandoned the contact (Longest Delay to Abandon), as might be the case in a Web chat scenario.

Quality Measures

In addition to the "how fast" measures outlined above, perhaps a more significant indicator of customer satisfaction is "how well" the contact was handled, indicated by the following measures:

7. First Resolution Rate
The percentage of transactions that are completed within a single contact, often called the "one and done" ratio, is a crucial measure of quality. It gauges the ability of the center, as well as of an individual, to accomplish an interaction in a single step without requiring a transfer to another person or area, or needing another transaction at a future time to resolve the customer issue. The one-call completion rate is a crucial factor in customer perception of quality. The satisfactory resolution of a call is tracked overall in the center, as well as by type of call, and perhaps by time of day, by team, or by individual.

The one-contact resolution rate should likewise be tracked in the contact center for email transactions and Web interactions. The resolution rate will likely be lower for emails, as it generally takes multiple messages between two parties to resolve a matter to completion.

8. Transfer Rate
The transfer percentage is an indication of what portion of contacts has to be transferred to another person or place to be handled. Tracking transfers can help fine-tune the routing strategies as well as identify performance gaps of the staff. Likewise, tracking emails that must be transferred to others or text chat interactions that require outside assistance is useful to identify personnel training issues or holes in on-line support tools.

9. Communications Etiquette
One of the critical factors that impact the caller's perception of how well the call was handled is simple courtesy or etiquette**.** The degree to which general telephone communications skills and etiquette are displayed is generally measured via observation or some form of quality monitoring as an individual gauge of performance.

Email and Web chat etiquette should also be observed. There are standard wordings that should be followed in both types of communications that should be carefully observed, reviewed, and reported as a quality measure of performance. This is particularly true since a written record of the interaction will exist.

10. Adherence to Procedures
Adherence to procedures such as workflow processes or call scripts is another essential element of quality. This is particularly important to perceived quality in terms of the customer receiving a consistent interaction regardless of the contact channel or the individual agent involved in the contact. In the call center, adherence to processes and procedures is typically measured for individuals through simple observation and through the quality monitoring process.

Adherence to processes and procedures is also important for other channels of contact. Written scripts and pre-approved responses are generally created, and adherence to these is monitored and recorded via observation or screen capture capabilities in a quality monitoring system.

Efficiency Measures

Executives in every type of organization are concerned with how well its resources are being put to use. That is especially true in a call center environment where over two-thirds of operating expenses are related to personnel costs.

11. Agent Occupancy
Agent occupancy is the measure of actual time busy on customer contacts compared to available or idle time, calculated by dividing workload hours by staff hours. Occupancy is an important measure of how well the call center has scheduled its staff and how efficiently it is using its resources. If occupancy is too low, agents are sitting around idle with not enough to do. If occupancy is too high, the personnel may be overworked.

Where agent occupancy is the end result of how staffing is matched to randomly arriving workload in a call center, the desired level of occupancy may drive staffing decisions in a sequential work environment like processing emails. Since Web chat interactions are essentially random events like incoming calls, the same measures of occupancy apply here as in an incoming call scenario.

12. Staff Shrinkage
Staff shrinkage is defined as the percentage of time that employees are not available to handle calls. It is classified as non-productive time, and is made up of meeting and training time, breaks, paid time off, off-phone work, and general unexplained time where agents are not available to handle customer interactions. Staff shrinkage is an important number to track, since it plays an important role in how many people will need to be scheduled each half-hour. The same measures of shrinkage that are used for call center calculations apply to the multi-channel contact center as well.

13. Schedule Efficiency
Workforce management is all about getting the "just right" number of people in place each period of the day to handle customer contacts—not too many and not too few. Schedule efficiency measures the degree of overstaffing and understaffing that exist as a result of scheduling design. Net staffing may be measured by half-hour as an indication of how well the resources in the center are being utilized.

Schedule efficiency for responding to the randomly arriving Web chats should be measured just like that for incoming call centers. Since emails typically represent sequential rather than random workload, the work fits the schedule and therefore overstaffing and understaffing measures are less relevant.

14. Schedule Adherence
Schedule adherence measures the degree to which the specific hours scheduled are actually worked by the agents. It is an overall call center measure and is also one of the most important team and individual measures of performance since it has such as great impact on productivity and service. Schedule adherence is one of the most important measures the multi-channel contact center as well. Specific hours worked is less of an issue in a group responding to emails rather than real-time demand of calls and Web

chats, but is still relevant in processing the work in a timely manner, especially if response time guarantees exist.

15/16. AHT/ACW
A common measure of contact handling is the average handle time (AHT), made up of talk time plus after-call work (ACW). To accommodate differences in calling patterns, it should be measured and identified by time of day as well as by day of week.

Average handle time is also a measure that is important in determining the other types of multi-channel contact workload. It is much harder to calculate, however, given the difficulties of truly measuring how long it takes to handle an email or a Web chat transaction. An email may be opened and put aside for varying amounts of time before completing. Likewise, a Web chat session may appear to take longer than it actually does since a Web agent typically has several sessions open at once. Therefore each one takes longer based on start and end time. Automated tracking of these actual handle times is difficult with numbers coming from email management systems often overstated in terms of actual handle time.

17. System Availability
When response time from the computer system is slow, it can add seconds or minutes to the handle time of a transaction. In the call center, system speed, uptime, and overall availability should be measured on an ongoing basis to ensure maximum response time and efficiency as well as service to callers. For example, if the IVR typically handles 50 percent of calls to completion, but the IVR is out of service, many more calls will require agent assistance than normal causing overtime costs, long delays, and generally poor service. Often this will be a measure of performance that resides in the IT department, but is also a crucial measure of contact center performance.

Profitability Measures

A final category of performance measures includes those that indicate the inbound and outbound flow of money in the center, as indicated by the measures below.

18. Conversion Rate
The conversion rate refers to the percentage of transactions in which a sales opportunity is translated into an actual sale. It can be measured as an absolute number of sales or as a percentage of calls that result in a sale. Conversion rate should be tracked and measured for incoming calls, as well as outgoing calls, email transactions, and other Web interactions.

19. Up-Sell/Cross-Sell Rate
The up-sell rate or cross-sell rate is measured by many organizations as a success rate at generating revenue over and above the original order or intention of the call. It is becoming an increasingly common practice, not just for pure revenue-generating call centers but for customer service centers as well. Although more prevalent in the telephone center, it is also an appropriate measure of performance for other communications channels.

20. Cost per Call

A common measure of operational efficiency is cost per call or cost per minute to handle the call workload, both in a simple call center as well as in a multi-channel contact environment. This cost per call can be simply a labor cost per call, or it can be a fully loaded rate that includes wage rates in addition to telecommunications, facilities, and other services costs. In setting cost per call, it is critical to define the components being used, and to use them consistently in evaluating how well the center is making use of financial resources over time. While commonly used to compare one company or site to another in benchmarking, this is not a good practice as the components included and the types of contacts will often vary.

Performance Category	Performance Measure	CC Quantity Measure	CC Quality Measure	Agent Quantity Measure	Agent Quality Measure
Service	Blockage	x			
	Abandon rate	x			
	Self-service availability	x			
	Speed of answer (SL, ASA)	x			
	Longest delay in queue	x			
Quality	One contact completion rate	x	x	x	x
	Transfer rate	x	x	x	x
	Communications etiquette		x		x
	Adherence to procedures		x		x
Efficiency	Occupancy	x			
	Shrinkage	x			
	Schedule efficiency	x			
	Schedule adherence	x		x	
	AHT/ACW	x		x	
	System availability	x			
Profitability	Conversion rate	x		x	
	Up-sell rate	x		x	
	Cost per call	x			

Summary

There are many performance measures that apply to an inbound telephone call center and most of these apply to a multi-channel contact center as well. In some cases the measure will be slightly different, but most of these qualitative and quantitative measures apply to both types of centers. Some are considered measures of performance for the entire operation, while others are considered to be individual agent measures. In every case, the measure should be used to identify performance excellence to be rewarded, and gaps that need to be closed with coaching, process change, or other adjustments.

About the Author….

Penny Reynolds is a Founding Partner of The Call Center School, a Nashville, TN based consulting and education company. She has more than 20 years of experience in the telecommunications and call center industry, and has worked with hundreds of call centers in the area of workforce planning, technology implementation, and process improvement. Penny is the author of *Call Center Staffing: The Complete, Practical Guide to Workforce Management*. She may be reached at 615-812-8410 or at penny.reynolds@thecallcenterschool.com.